

SPORT VOLUNTEER PROJECT

Fundraising

Produced by Parks and Recreation Ontario and the Sport Alliance of Ontario with support from the Ontario Trillium Foundation.

Length of Workshop

3 hours (including 15 minute break)

Registration Package

(sent in advance):

- Time and Location of Training
- Name of Trainer
- Goals of Workshop and Agenda
- Information about parking, reimbursement of expenses, child care arrangements, accessibility to those with disabilities
- Resource Links Page (for those who want to review in advance)

Room Set-Up

- Table groups with 5 to 7 places at each
- Resource table
- Presenter's table
- Flipcharts and stands (2 if possible)
- Sample resources on resource table
- Hand Outs on Tables

Materials

- Refreshments (as desired)
- Name tags
- Pens and lined paper for each table
- Flipchart paper, enough for every table
- Masking tape for posting pages on wall
- Markers, enough for every table

Hand Outs

- [A Fundraising Resource Kit for Developing a Fundraising Plan](#)
- Resource Links Sheet
- Evaluation Form
- Participant List (if desired, or if group is large) *Because of privacy concerns, don't share more than names and organizations without expressed permission from participants to do so.*

Before Workshop

Prepare and post on flipcharts:

Agenda

1. Introductions
2. Why Do People Give?
3. Assess Your Needs
4. What Kind of Fundraising?
5. Preparing a Strategy: readiness, making the case, prospects and shopping lists, before you ask
6. Wrap-Up and Evaluation

Goals of the Workshop

At the end of this workshop you will be able to:

1. Be able to assess your needs and choose a fundraising strategy;
2. Be able to prepare an action plan;
3. Gain tips and links to suppliers to help you be more effective

Guidelines for Working Together (examples)

- Equal Chance to Participate
- Respect and Listening
- Finish on Time
- Look after your own needs (breaks, refreshments, ask if you don't understand)

You may also want to flipchart for easy reference during the workshop the Introduction guidelines and the main points that are in text below.

Note re: Size of Group

The style of facilitation and kind of exercises you choose from the options below will depend on how many people attend the workshop. The goal is to ensure that all participants can contribute equally within the time available. A small group equals two to ten people.

1 Introductions — 15 minutes

Facilitator introduces him/herself, and does 'housekeeping' items, e.g. location of washrooms, refreshments, who to ask about expense questions, etc.

Then review the goals of the workshop and answer any questions.

Facilitator asks each participant to briefly introduce themselves according to the guidelines for introductions, e.g.

- Give your name, group, and why you came to this workshop;
- one hope or expectation for the session.

If participants don't already have a sponsorship, ask them to offer one they have heard about, or one they want.

*Flipchart the hopes and expectations and the examples of sponsors in separate lists **or ask a participant to scribe for you.** If you fill more than one page of each, post the pages on wall.*

If your group is larger than 15 people, do this process in groups of 4 to 8 by giving tables 5-10 minutes to introduce themselves to each other, and share their hopes/expectations and examples of fundraising. Then ask each table in turn to name just one hope/expectation and flipchart the responses. Go around the tables again until you cover most of the ideas raised by the tables.

When everyone is finished, review the hopes/expectations list. If some of the hopes/expectations won't be covered by the day's agenda, suggest where people might get the info, e.g. in another workshop or where else they could look. You may want to add some hope/expectations that were mentioned (e.g. have fun!) to the guidelines for working together.

Point out that we will come back to the examples of fundraising later, then segue to the next section by reviewing the agenda, pointing out what parts of the agenda will meet the other hopes and expectations.

2 Why Do People Give? — 15 minutes

Ask participants to think of donations they have made in the past (including buying tickets or goods or giving goods and services away), then say why they donated. Flipchart their responses. Present the maxims below and ask how or if their reasons reflect the maxims, or if they would like to come up with any more. Summarize by asking participants to keep their own motivations for giving in their minds as they prepare to fundraise.

FUNDRAISING MAXIMS

- People give to people.
- Fundraising works best when the right person asks the right person for the right amount for the right reason at the right time, in the right way.

- You can't ask if you don't give yourself.
- The first rule of fundraising is to ask. The second is to say thank you, as often as you can.

3

Assess Your Needs — 30 minutes

Ask for examples that answer the questions below, or make the connection between the categories and the examples of fundraising that participants gave in the introduction

Dollars

How much do you want to raise?
Quick cash, project specific?
One time vs. ongoing?

Timeframe

When do you need the money?
Short-term, playing season?
Long term 1-3 years

Need

Small & quick
One time
Next plateau
Ongoing long term

Best Source

Look to yourselves
Service clubs, one event
Grants, foundations, Trillium
Big investment in planning

4

Kinds of Fundraising — 15 minutes

Briefly explain the kinds of fundraising below (p. 15-25 in the Fundraising Manual) if participants are not familiar with them, or have participants who have experience with them explain, perhaps including the pros and cons for small sports groups.

- Direct Mail
- Special Events
- Major Gifts
- Planned Giving
- Foundation Grants
- Corporate Donations and Sponsorships
- Gaming
- Merchandising – e.g. selling magazines, chocolates, etc.

Ask table groups

Choose one of the “results” from the first exercise and craft one compelling message that would convince the target audience to help achieve it. Write your message on a flipchart for the other groups to see.

In plenary,

When everyone has written their message, ask every participant to “vote” for their favourite message by marking a check beside it (you can give two or more votes to each person depending on the number of groups and messages you have). Discuss in plenary what factors made for the most popular message. If time allows, ask groups to improve their message based on the discussion.

5

Preparing a Strategy Readiness — 30 minutes

Handout the readiness checklist. Ask tables to work in groups, and flipchart a one sentence answer to #1, #2 and #3. Remind them that the checklist refers to fundraising readiness, e.g. are your board and staff convinced of the need and ready to participate in fundraising, are your mission, goals and financial information ready to present to a funder, etc. When they are finished, they should post their flipchart for other groups to see, and take their break.

Instructions for Groups

1. Assess your fundraising needs. What is your priority need?
2. To meet that need, what kind of fundraising is your best bet, and why?
3. Complete the readiness checklist for your organization. Name two or three of the most important gaps or needs you need to fill.

Break *During or after the break, encourage participants to take a “gallery walk” to review and ask questions about what other groups have done*

Making the Case — 30 minutes

Present the Case Statement material and ask groups to write a few words to answer each the six questions, keeping the qualities of a good case statement in mind.

A Case Statement answers:

1. Who are you and how are you unique?
2. The Vision (the need, stated as a positive result)
3. What have you done so far (accomplishments)
4. What do you want to do? (plan)
5. How the funds will be used/acknowledged (accountability/recognition)
6. What impact will the support have?

A Good Case Statement

- Informs
- Inspires
- Motivates
- Asks for immediate action and involvement
- Instills urgency
- Invites follow-up

Go around the tables and ask them to share their responses to some of the questions. Note that other workshops in this series contain information and resources useful to making the case (i.e. Corporate Sponsorships, Grant Proposals, Communication Planning and Media Relations).

Prospects and Shopping Lists – 15 minutes

Shopping Lists – 20 minutes

Point out that sponsorships can be more than money – gifts in kind or goods or services are often much easier to find than donations of cash. Even if you ask for cash, a shopping list helps you say exactly why you need the money.

Ask table groups to:

Think of your budget and activities for one year.

- i) Make shopping list(s) that include all the kinds of things you need, use or buy over of the year. For example, you might start with categories like:
 - Space
 - Equipment
 - People
 - Goods and Supplies
 - Services, etc.

- ii) *Provide more detail under at least one category, e.g. “Goods and Supplies” might include office supplies, sports equipment, first aid supplies, uniforms, refreshments for participants and volunteers, prizes for participants, thank you gifts for volunteers, or food for the final banquet, and so on.*
- iii) *Develop a list of three or four prospects you think might be interested and able to support either/or:*
 - a. *Your case for support*
 - b. *Some items on your shopping lists*

8 Before You Ask – 15 minutes

Present the following information and ask participants to share any expertise or experiences they have related to it.

Do Your Research – Know:

- what your prospect already supports and at what level
- who else is asking
- what they need, how you can help them

Avoid Conflicts

- Local, regional, provincial and national policies on coordinating approaches?
- Keep and share records of past and current approaches and their responses
- Know the competition (who are your competitors and the prospect’s competitors?)

Donations and Receipting

- CCRA regulations are complicated – get advice!
- Check with your municipality or provincial sport organization – can they help?

9 Wrap-Up and Evaluation – 15 minutes

Review some of the links on the resource sheet.

Encourage participants to complete and hand in the evaluation forms, and/or do an evaluation round. *For example, a ‘weather report’ where everyone says how they are feeling in the form of a weather report, or ask for their responses - Positives, Negatives and Would change” (e.g. +, _ and ~) and note them in 3 columns on a flipchart.*

Facilitator thanks those who contributed (organizers, caterers, etc.) and participants, and adjourns.

SUGGESTIONS FOR ONLINE RESOURCE LINKS

<http://www.sportalliance.com/Content/Volunteer%20Resources.asp>

Sports Alliance of Ontario Volunteer Resource Page

<http://volunteer.ca/volunteer/pdf/CSC/SFMFundraisingENG.pdf>

Developing a Fundraising Strategy – 2005. The English version of a resource originally developed by the Société franco-manitobaine. Oriented to grassroots groups, includes lists of kinds of fundraising and websites of fundraising project suppliers.

<http://www.neilsquire.ca/snapfiles/pdf%2ffundraising%2520resource%2520kit.pdf>

A fundraising resource kit for developing a fundraising plan: 27 page manual developed in 2003 by the Neil Squire Foundation “to help smaller to mid-size organizations to understand basic principles of fundraising in a clear and concise manner.”

http://www.givingandvolunteering.ca/pdf/factsheets/Motivations_and_Barriers_to_Donating.pdf

Motivations and Barriers to Giving – a two page factsheet developed from the 2000 National Survey on Giving, Volunteering and Participating

<http://www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/pdfdocs/Fr4grass.pdf>

Fundraising Ideas that Work for Grassroots Groups by Ken Wyman. Written in the 1990's but still good. 194 pages.

<http://www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/pdfdocs/SpecEv.pdf>

Guide to Special Event Fundraising by Ken Wyman. Includes a useful 'eventability' checklist to gauge whether a special event is worthwhile. 174 pages.

<http://www.fundsport.ca/>

A Canadian nonprofit group specializing in fundraising for sports groups. The site has articles and lists of fundraising ideas and suppliers.